

LESSON 1

PROCESSING PRs

PROCESSING PRs

- **IDENTIFY OMISSIONS /
DEFICIENCIES**

**Advise RAs and explain what is
needed**

**Accept PR and establish
Contract File**

Control Data

PR REVIEW CHECKLIST	OMISSIONS / DEFICIENCIES
Approvals / Reviews	
Funding	
Quantity	
Description	
Packaging / Marking	
Inspection / Acceptance	
Delivery	
Contract Admin.	
Sp. Provisions / Clauses	
Tech. Eval. Factors	
Sources	
Acquisition Plan	
SIGNATURE	DATE

PROCESSING PRs

**Identify Omissions /
Deficiencies**

- **ADVISE RAs and EXPLAIN
WHAT IS NEEDED**

**Accept PR and establish
Contract File**

Control Data

PROCESSING PRs

**Identify Omissions /
Deficiencies**

**Advise RA and explain what is
needed**

- **ACCEPT PR AND ESTABLISH
CONTRACT FILE**

Control Data

PROCESSING PRs

**Identify Omissions /
Deficiencies**

**Advise RA and explain what is
needed**

**Accept PR and establish
Contract File**

- **CONTROL DATA**

LESSON 2

FUNDING

FUNDING

- **IDENTIFY TYPE OF FUNDS
MADE AVAILABLE**

Identify the date funds must be obligated

Return PR if correction needed

Determine if fund amount is realistic

FUNDING

Identify type of funds made available

- **IDENTIFY DATE FUNDS MUST BE OBLIGATED**

Return PR if correction needed

Determine if fund amount is realistic

FUNDING

Identify type of funds made available

Identify the date funds must be obligated

- RETURN PR IF CORRECTION NEEDED**

Determine if fund amount is realistic

FUNDING

Identify type of funds made available

Identify the date funds must be obligated

Return PR if correction needed

- **DETERMINE IF FUND AMOUNT IS REALISTIC**

LESSON 3

MARKET RESEARCH

MARKET RESEARCH

- **RESEARCH ACQUISITION HISTORIES**

Identify data from published sources

Identify data from other people

Compile market data

LIST OF COMPANIES

VG 3 - 2

RESOURCES

MARK

Thomas Registers

Yellow Pages

Producer Price Index

Procurement Directories

Monthly Labor Review

Lists of Items of a Similar Nature

Consumer Price Index

Product Brochures / Promotional Literature

MARKET PRICE TRENDS

VG 3 - 3

RESOURCES	MARK
Thomas Registers	
Yellow Pages	
Producer Price Index	
Census Statistics	
Commodity Indices	
BOA	
Consumer Price Index	
Informational Requests for Quotations	
Product Brochures / Promotional Literature	
Catalogs of Manufacturers, Distributors, etc	

PRODUCT DESCRIPTIONS

VG 3 - 4

RESOURCES	MARK
Thomas Registers	
Yellow Pages	
Vendor File	
Mandatory and Optional Schedules	
Commodity Indices	
BOA	
Procurement Directories	
Informational Requests for Quotations	
Product Brochures / Promotional Literature	
Catalogs of Manufacturers, Distributors, etc	
GSA Federal Supply Schedules	
Federal Procurement Data Center	

TECHNICAL IMPROVEMENTS

VG 3 - 5

RESOURCES	MARK
CBD	
Trade Journals	
Vendor File	
Mandatory and Optional Schedules	
Commodity Indices / CPI, PPI	
BOA	
Procurement Directories	
Informational Requests for Quotations	
Product Brochures / Promotional Literature	
Catalogs of Manufacturers, Distributors,etc	
GSA Federal Supply Schedules	
Federal Procurement Data Center	

MARKET RESEARCH

Research acquisition histories

- **IDENTIFY DATA FROM PUBLISHED SOURCES**

Identify data from other people

Compile market data

MARKET RESEARCH

Research acquisition histories

Identify data from published sources

- **IDENTIFY DATA FROM OTHER PEOPLE**

Compile market data

MARKET RESEARCH

Research acquisition histories

Identify data from published sources

Identify data from other people

- **COMPILE MARKET DATA**

LESSON 4

SPECIFICATIONS & SOWS

SPECIFICATIONS

- **REVIEW MARKET RESEARCH**

Determine if FEDSPEC or MILSPEC is applicable

Identify problems in using as is

Critique purchase description

Critique related elements of PR

**Advise RA, obtain justifications,
& decide on referencing specs.**

SPECIFICATIONS

Review market research

- **DETERMINE IF FEDSPEC OR MILSPEC IS APPLICABLE**

Identify problems in using as is

Critique purchase description

Critique related elements of PR

**Advise RA, obtain justifications,
& decide on referencing specs.**

SPECIFICATIONS

Review market research

Determine if FEDSPEC or MILSPEC is applicable

- **ID. PROBLEMS IN USING AS IS**

Critique purchase description

Critique related elements of PR

**Advise RA, obtain justifications,
& decide on referencing specs.**

SPECIFICATIONS

Review market research

Determine if FEDSPEC or MILSPEC is applicable

Identify problems in using as is

- **CRITIQUE PURCH. DESCRIP.**

Critique related elements of PR

**Advise RA, obtain justifications,
& decide on referencing specs.**

SPECIFICATIONS

Review market research

Determine if FEDSPEC or MILSPEC is applicable

Identify problems in using as is

Critique purchase description

- **CRITIQUE ELEMENTS OF PR**

**Advise RA, obtain justifications,
& decide on referencing specs.**

SPECIFICATIONS

Review market research

Determine if FEDSPEC or MILSPEC is applicable

Identify problems in using as is

Critique purchase description

Critique related elements of PR

- **ADVISE RA, OBTAIN JUST., & DECIDE ON REF. SPECS.**

STATEMENT OF WORK

- **REVIEW MARKET RESEARCH**

Critique proposed SOW

Critique related elements of PR

Advise RA and obtain changes

**Select and implement techniques
to test and improve the SOW**

Obtain final SOW

STATEMENT OF WORK

Review market research

- **CRITIQUE PROPOSED SOW**

Critique related elements of PR

Advise RA and obtain changes

**Select and implement techniques
to test and improve the SOW**

Obtain final SOW

STATEMENT OF WORK

Review market research

Critique proposed SOW

- **CRITIQUE ELEMENTS OF PR**

Advise RA and obtain changes

**Select and implement techniques
to test and improve the SOW**

Obtain final SOW

STATEMENT OF WORK

Review market research

Critique proposed SOW

Critique related elements of PR

- **ADVISE RA AND OBTAIN CHANGES**

Select and implement techniques to test and improve the SOW

Obtain final SOW

STATEMENT OF WORK

Review market research

Critique proposed SOW

Critique related elements of PR

Advise RA and obtain changes

- **SELECT & IMPLEMENT TECH.
TO TEST AND IMPROVE SOW**

Obtain final SOW

STATEMENT OF WORK

Review market research

Critique proposed SOW

Critique related elements of PR

Advise RA and obtain changes

**Select and implement techniques
to test and improve the SOW**

- **OBTAIN FINAL SOW**

LESSON 5

SERVICES & WAGE DETERMINATIONS

SERVICES

- **IDENTIFY REQUIREMENT FOR SERVICES**

Determine if services are personal or nonpersonal

Determine if services are advisory and assistance

SERVICES

Identify requirement for services

- **DETERMINE IF SERVICES ARE PERSONAL OR NONPERSONAL**

Determine if services are advisory and assistance

SERVICES

Identify requirement for services

Determine if services are personal or nonpersonal

- **DETERMINE IF SERVICES ARE ADVISORY AND ASSISTANCE**

WAGE DETERMINATIONS

- **DETERMINE IF SCA APPLIES**

Notify interested parties under CBA

Obtain wage determination

Review wage determination and incorporate into solicitation

Update the wage determination

WAGE DETERMINATIONS

Determine if SCA applies

- **NOTIFY INTERESTED PARTIES UNDER CBA**

Obtain wage determination

Review wage determination and incorporate into solicitation

Update the wage determination

WAGE DETERMINATIONS

Determine if SCA applies

Notify interested parties under CBA

- **OBTAIN WAGE DETERMINATION**

Review wage determination and incorporate into solicitation

Update the wage determination

WAGE DETERMINATIONS

Determine if SCA applies

Notify interested parties under CBA

Obtain wage determination

- **REVIEW WAGE DETERMINATION & INCORPORATE INTO SOLICITATION**

Update the wage determination

WAGE DETERMINATIONS

Determine if SCA applies

Notify interested parties under CBA

Obtain wage determination

Review wage determination and incorporate into solicitation

- **UPDATE WAGE DETERMINATION**

FACTORS FOR PERSONAL SERVICES

- 1. Performance on site.**
- 2. Principle tools and equipment furnished by the Government.**
- 3. Services are in furtherance of assigned function or mission.**
- 4. Civil service personnel are performing comparable services.**
- 5. Service will be needed beyond one year.**
- 6. Requires Government direction, directly or indirectly.**

FACTORS FOR ADVISORY/ASSISTANCE SERVICES

- 1. Obtain outside points of view to avoid too limited judgement on critical issues.**
- 2. Obtain advice regarding developments in industry, university, foundation research.**
- 3. Obtain opinions, special knowledge, or skills of noted experts.**
- 4. Enhance understanding of, and develop alternative solutions to complex issues.**
- 5. Support and improve operation of organizations.**
- 6. Ensure more efficient or effective operation of managerial or hardware systems.**

PROHIBITIONS AGAINST ADV. /ASST. SERVICES

- 1. Perform work of a policy, decision making, or managerial nature which is the direct responsibility of agency officials.**
- 2. Bypass or undermine personnel ceiling, pay limitations, or competitive employment procedures.**
- 3. Contract for, on a preferential basis, former Government employees.**
- 4. Specifically aid in influencing or enacting legislation.**
- 5. Obtain professional or technical advice which is readily available within the agency or another Federal agency.**

STEPS TO REQUEST WAGE DET.

- 1. Identify Skill Categories.**
- 2. Estimate Number in each Skill Class.**
- 3. Identify Comparable Rates for Government.**
- 4. Obtain Copy of Bargaining Agreement.**
- 5. Identify Places of Performance.**
- 6. Complete SF 98 and 98A.**

REQUIREMENTS FOR:

Office Products

Study on Management Efficiency

On Site Report Typing

Preaward Survey

Payroll

Hair Care

Cellular phone

Engineering Training Materials

Dry Cleaning

Security Guard

Housekeeping

Maps

Computer Software

ADP Telecommunications

Operation of Gift Shop

LESSON 6

SOURCE LISTS

REQUIRED SOURCES

- **CHECK REQUIRED SOURCE**

**Determine if Required Source
Meets the Need**

**Compare Price with Open
Market**

**Place Order with Required
Source**

REQUIRED SOURCES

Check Required Source

- **DETERMINE IF REQUIRED SOURCE MEETS THE NEED**

Compare Price with Open Market

Place Order with Required Source

REQUIRED SOURCES

Check Required Source

**Determine if Required Source
Meets the Need**

- **COMPARE PRICE WITH
OPEN MARKET**

**Place Order with Required
Source**

REQUIRED SOURCES

Check Required Source

**Determine if Required Source
Meets the Need**

**Compare Price with Open
Market**

- **PLACE ORDER WITH
REQUIRED SOURCE**

COMMERCIAL SOURCES

- **REVIEW ACQUISITION HISTORY**

Prepare Source List

Purge Source List

Rotate Source List

Update Source List

COMMERCIAL SOURCES

Review Acquisition History

- **PREPARE SOURCE LIST**

Purge Source List

Rotate Source List

Update Source List

COMMERCIAL SOURCES

Review Acquisition History

Prepare Source List

- **PURGE SOURCE LIST**

Rotate Source List

Update Source List

COMMERCIAL SOURCES

Review Acquisition History

Prepare Source List

Purge Source List

- **ROTATE SOURCE LIST**

Update Source List

COMMERCIAL SOURCES

Review Acquisition History

Prepare Source List

Purge Source List

Rotate Source List

- **UPDATE SOURCE LIST**

QUALIFIED LISTS

Verify Applicability

**Forward Requests for
Information**

**Screen Offers against Qualified
List**

Report Conditions for Removal